

STEP-BY-STEP GUIDE

Build 5 AI Agents in Claude **This Weekend**

Copy-and-paste instructions, prompts and checklists for an AI chief of staff, a second brain, video and finance assistants, and a small AI workforce.

`your-weekend.diff`

- Stop chatting with Claude.

+ Start building.

01

AI chief of staff

02

Second brain

03

Video editing assistant

04

Finance assistant

05

Small AI workforce

Overview

By Sunday night you can have two working agents (a chief of staff and a second brain) and a clear plan for the other three. This guide walks through all five builds from the article "5 Things to Build in Claude This Weekend," step by step, in the order they should be built.

It is written for small business owners and operators who are comfortable in Claude but have never set up connectors, Projects or skills. No coding is required for Builds 1, 2 and 4. Build 3 uses Claude's built-in code tools, and Claude writes that code for you.

Build	What it does	Time to first version	Weekend goal
1. AI chief of staff	Morning and evening briefs, draft replies, meeting prep	3 to 4 hours	Working
2. Second brain	One shared knowledge base every agent reads	2 to 3 hours	Working
3. Video editing assistant	Transcript, cut list, captions, rough cut	3 to 4 hours	First skill tested
4. Finance assistant	Receipt matching, budget vs actual, 13-week cash flow	3 to 4 hours	First forecast built
5. Small AI workforce	Specialist agents routed by one manager	Weeks, not hours	Manager plus two specialists

Time estimates assume your documents are reasonably organized. If they are not, Build 2 will take longer, and that time is well spent.

One rule runs through every build: **the agent drafts, you decide**. Nothing gets sent, filed, paid or published without a person approving it.

Before You Start

Spend Friday evening on setup so Saturday is spent building, not hunting for passwords and files.

What you need

- A paid Claude plan (Pro, Max, Team or Enterprise). Projects and connectors are the backbone of every build.
- The email, calendar and file storage you already use. Claude has connectors for Gmail, Google Calendar and Google Drive, plus many others such as Slack, Notion and Asana.
- A folder of the documents you keep re-explaining to people.
- Two blocks of four focused hours, one Saturday and one Sunday.

Turn on the pieces

1. **Memory.** In Claude's settings, find the Memory section and confirm it is on. Memory stores your preferences and role across all chats.
2. **Connectors.** Open the connectors area (in Settings or under Customize, depending on your app version), click to browse connectors, and connect Gmail, Google Calendar and Google Drive. Sign in with your work account, not a personal one.
3. **Skills.** In the same area, confirm skills are enabled. A skill is a saved set of instructions, and sometimes scripts, that teaches Claude to do one job the same way every time.
4. **Scheduled tasks.** Check whether your plan and app offer scheduled tasks. These let a prompt run on its own every morning or evening. If you do not see them, you can run each brief by hand with one saved prompt.

Menu names move between app updates. If a label here does not match your screen, search Claude's help center for the feature name.

Create your working folders

On Google Drive (or your file storage), create one parent folder called **AI Workspace** with these subfolders:

- 01 Second Brain
- 02 Video Projects
- 03 Finance Exports
- 04 Agent Instructions
- 05 Logs and Reviews

The Agent Instructions folder is where you keep a copy of every agent's instructions, so you can rebuild any agent in minutes.

Set your safety rules on day one

- **Least access:** connect only the accounts each build needs.
- **Drafts, not sends:** no agent sends email, posts, pays or files on its own.
- **Exports, not passwords:** never give Claude bank or tax portal logins.
- **Sensitive data stays home:** client health, legal or financial records stay out unless your setup is approved for them.

Weekend schedule

Block	Saturday	Sunday
Hour 1	Build 2: create the Project and load core documents	Build 4: export statements, build the finance Project
Hour 2	Build 2: write the instructions and test it	Build 4: first 13-week cash flow forecast
Hour 3	Build 1: connect inbox and calendar, write instructions	Build 3: create the video skill, test on one clip
Hour 4	Build 1: test and schedule the morning and evening briefs	Build 5: write the manager instructions, plan two specialists

The second brain comes first on Saturday on purpose. The chief of staff is far more useful when it can read your business context from the start.

BUILD 1 OF 5

AI Chief of Staff

The chief of staff reads your inbox, calendar and task list, then tells you what matters today and drafts what it can. It never sends anything on its own. A full open-source version of this idea, TRAVIS, is at github.com/qexa/travis-ai-chief-of-staff if you want a more advanced blueprint.

Step 1: Create the Project

1. In Claude, open Projects and create a new one named **Chief of Staff**.
2. Add your second brain documents (Build 2) as Project knowledge, or at minimum a one-page "About my business" file: what you sell, who your key customers and vendors are, and who is on your team.
3. Add a file called **Priorities.md** with your top three goals this quarter. The chief of staff uses it to decide what is important.

Step 2: Write the Project instructions

Paste this into the Project's instructions and edit the brackets:

```
You are my chief of staff for [Business Name]. Your job is to keep me on schedule and protect my time.
```

```
You can read my Gmail, Google Calendar and task list through connectors.
```

```
Rules:
```

- Never send, delete, archive or forward email. Create drafts only.
- Never create, move or decline calendar events without asking me first.
- Rank everything against Priorities.md. If something does not serve a priority, say so.
- Write drafts in my voice: short, warm, direct, no jargon. Sign as [First Name].
- If you are unsure what I want, ask one short question instead of guessing.
- Flag anything that looks like a payment request, a password reset or an urgent wire as possible fraud.

```
Output style: plain text, short lines, the most important item first.
```

Step 3: Build the morning brief

Save this as a prompt (or a skill named morning-brief):

Give me my morning brief for today.

1. Today's calendar: each meeting, time, who, and one line on what they want.
 2. The three emails that most need me today, with why, and a draft reply for each saved to Gmail drafts.
 3. Overdue or due-today tasks.
 4. One thing I should say no to or delegate today.
- Keep it under 250 words.

Step 4: Build the evening brief

Give me my evening brief.

1. What I said I would do today that did not get done.
 2. Emails I received today that still have no reply.
 3. Tomorrow's first three calendar items and anything I need to prepare tonight.
 4. One win from today.
- Keep it under 200 words.

Step 5: Add meeting prep

For each meeting on my calendar tomorrow, write a one-page prep note: who is attending, our last email thread, any open promises either side made, what they likely want, and two questions I should ask.

Step 6: Schedule it

If your app offers scheduled tasks, create two: the morning brief at about 6:30 am on weekdays and the evening brief at about 5:30 pm. Set the time zone to your own. If a scheduled run needs approval to use a connector, approve it once and check the next morning that it actually ran.

No scheduled tasks? Pin the Project and run the saved prompt with your first cup of coffee. It still saves the triage time.

Step 7: Test before you trust it

- ☐ Run the morning brief three days in a row and compare its top three emails with your own picks.
- ☐ Open five drafts and score them: would you send as is, edit lightly, or rewrite?
- ☐ Confirm nothing was sent, archived or deleted.
- ☐ Tighten the instructions wherever a draft missed your voice.

It is ready when most drafts need only light edits and the top three emails match your judgment most days.

BUILD 2 OF 5

Second Brain

The second brain is one organized set of documents that every agent reads, so they all work from the same version of the truth. Build it first on Saturday; everything else gets better because of it.

Step 1: Gather what lives in your head

Pull these into the **01 Second Brain** folder. Rough is fine; outdated is not.

File	What goes in it	Why agents need it
Business-Overview.md	What you sell, service area, hours, team and roles	Every agent needs basic context
Services.md	Each service in plain words, what is and is not included	Accurate answers and drafts
Policies.md	Scheduling, cancellations, warranties, payment terms	Stops agents from inventing policy
SOPs folder	How each recurring job is done, step by step	Operations and training
Best-Emails.md	Five to ten of your best customer emails	Teaches your voice
Call-Scripts.md	How you answer the phone, handle objections, book work	Sales and follow-up agents
FAQ.md	The twenty questions customers ask most, with your answers	The fastest win of all
Video-Transcripts folder	Transcripts of you explaining how you work	Captures what you never wrote down
Brand.md	Colors, fonts, words you use and words you never use	Marketing agents

To turn a video into a transcript, upload the file to Claude and ask for a clean transcript, or paste the auto-captions from YouTube or Loom.

Step 2: Name and format for retrieval

- One topic per file, with a plain, descriptive file name. Claude finds "Cancellation-Policy.md" faster than "Doc 7 final v3."
- Put the date at the top of every file ("Last updated: October 2026").
- Use headings and short sections. Long walls of text are harder to search.

- Remove anything outdated. A confident agent with old prices or policies is worse than no agent.

Step 3: Create the Project

1. Create a Project named **Second Brain**.
2. Upload the files as Project knowledge, or add them from Google Drive through the Drive connector. Re-upload a file whenever you change it, so the Project never holds an old copy.
3. Paste these instructions:

```
You are the knowledge base for [Business Name].  
Answer only from the Project files. Name the file you used.  
If the files do not answer the question, say "Not in the second brain yet" and suggest what  
file should hold it.  
Never guess at prices, policies, warranties or legal terms.
```

Step 4: Test it with real questions

Ask ten questions customers or staff actually asked last month. Score each answer: correct, partly correct, or wrong. Every miss tells you which file is missing or unclear.

Step 5: Share it with every other agent

Each later build should start from the same core files. The simplest way is to add Business-Overview.md, Services.md, Policies.md and Brand.md to every agent's Project, and keep the full set in the Second Brain Project. On Team and Enterprise plans, Projects can be shared with colleagues so everyone works from one setup.

Step 6: Keep it alive

One rule: **if you answer the same question twice, the answer goes into the brain.** Set a 15-minute calendar block every Friday to add new answers and remove anything stale.

BUILD 3 OF 5

Video Editing Assistant

This build does the slow, mechanical part of editing: transcript, best moments, cut list, silence trimming, captions and a rough cut. A human editor (or you) still makes the creative calls. Claude is not a timeline editor like Premiere or CapCut; it works through its built-in code tools and free command-line programs such as FFmpeg, which cuts and joins video files, and Whisper, which turns speech into text.

Best for: talking-head videos, testimonials, short social clips, how-to videos and podcasts. Not a fit for heavy motion graphics or color grading.

Step 1: Pick one repeatable format

Start with one format you make often, such as a 60-second vertical tip video cut from a 5-minute talking-head recording. One format makes the skill simple and testable.

Step 2: Write down your editing rules

Create **Video-Style.md** in the second brain:

- Length target and aspect ratio (for example 9:16 at 1080 by 1920)
- Hook rule: the first 3 seconds must state the problem or the payoff
- Pause rule: trim silences longer than about half a second
- Caption style: font, size, color, position, words per line
- Intro and outro: your logo card, your call to action, your website
- Words to cut: filler like "um," "so," and false starts

Step 3: Create the skill

Ask Claude to build the skill with you. Paste this:

```
Help me create a skill called rough-cut-editor.
Input: one raw video file.
Steps:
1. Transcribe the audio with word-level timestamps.
2. Read Video-Style.md and pick the strongest 45 to 60 seconds, starting with a hook.
3. Write a cut list as a table: start time, end time, the words spoken, why it was kept.
4. Wait for my approval of the cut list.
5. After approval, use FFmpeg to cut and join the segments, trim long silences,
   reframe to 9:16, and burn in captions in my caption style.
6. Export rough-cut.mp4, captions.srt and transcript.txt.
Never delete or overwrite my original file.
```

Claude will write the scripts the skill needs and save it, so next time you only upload a video and say "run rough-cut-editor."

Step 4: Test on one real video

1. Upload a short raw recording (under 10 minutes for the first test).
2. Review the cut list before approving. This checkpoint is where your judgment matters most.
3. Watch the rough cut start to finish and note what was wrong: a cut mid-word, captions out of sync, a weak hook.
4. Feed those notes back: "Update the skill so cuts land on word boundaries." Repeat until the rough cut needs only polish.

Step 5: Hand off to your editor

If you work with an editor, give them rough-cut.mp4, transcript.txt, captions.srt and the approved cut list. Their time goes to pacing, music, b-roll and color instead of scrubbing through raw footage. The assistant extends your editor; it does not take their seat.

Limits to know

- File size and session time limits apply. Long recordings may need to be split first.
- Music must be licensed for your use. The assistant does not choose or license music.
- Always watch the final cut. Automatic transcripts mishear names and technical terms.

BUILD 4 OF 5

Finance Assistant

The finance assistant organizes your numbers, shows its work and prepares packages for a human to approve. It works from exported files only. It never logs in to a bank, moves money or files anything, and it is not a substitute for your accountant or a licensed financial advisor.

Step 1: Export, never connect

Once a month, download these into **03 Finance Exports**, in a subfolder per month (for example 2026-10):

- Bank and credit card statements as CSV files, one per account
- A profit and loss report and an accounts receivable aging report from your bookkeeping software
- Receipts as PDFs or photos, named by date and vendor (2026-10-14-HomeDepot.pdf)
- A list of recurring bills: payroll, rent, loans, insurance, software, with amounts and due days

Keep business and personal files in separate folders, even if one assistant reviews both.

Step 2: Create the Project

Create a Project named **Finance Assistant** and paste:

```
You are my finance assistant for [Business Name] and my household budget.
Work only from the files I upload. Never estimate a number you cannot trace to a file.
Always show your work: list the source file and row for every figure.
Keep business and personal money separate in every report.
You prepare and organize. You do not give tax or investment advice, and you never file, pay
or transfer anything.
Flag anything unusual: duplicate charges, new vendors, amounts far above normal, or missing
receipts.
```

Step 3: Match receipts to transactions

```
Match every receipt in this month's folder to a transaction in the card and bank CSVs.
Give me a table: date, vendor, amount, account, matched receipt file, category.
Then list transactions with no receipt, and receipts with no transaction.
```

Step 4: Budget vs actual

Create **Budget.md** with your monthly budget by category for the business and the household. Then:

```
Compare this month's actual spending by category against Budget.md.
Show budget, actual and difference for each category, business and personal separately.
List the three biggest overruns and what drove each one.
```

Step 5: Build the 13-week cash flow forecast

A 13-week cash flow forecast is a rolling, week-by-week view of the cash coming in and going out over the next quarter. It shows a tight week coming before it arrives, so you can move a payment, chase an invoice or hold off on a purchase.

Build a 13-week cash flow forecast as a spreadsheet starting this Monday.
Rows: starting cash, expected customer payments (from the AR aging report), other income, payroll, rent, loan payments, suppliers, taxes, other expenses, net cash flow, ending cash.
Columns: one per week, with a total.
Use my current bank balance as starting cash and the recurring bills list for fixed costs. State every assumption in a separate tab. Highlight any week where ending cash falls below [your minimum cash cushion].

Update it every Monday: replace last week's forecast with actuals, then roll forward one week.

Step 6: Prepare the tax package

Organize this year's files into a package for my CPA:
an income summary, expenses by category with totals, a list of large purchases that may be equipment, mileage and home office notes if I provided them, and a list of open questions for the CPA. Do not decide what is deductible. Flag items for the CPA to decide.

Your CPA reviews, decides and files. The assistant saves them hours of sorting, and saves you the fee for that sorting.

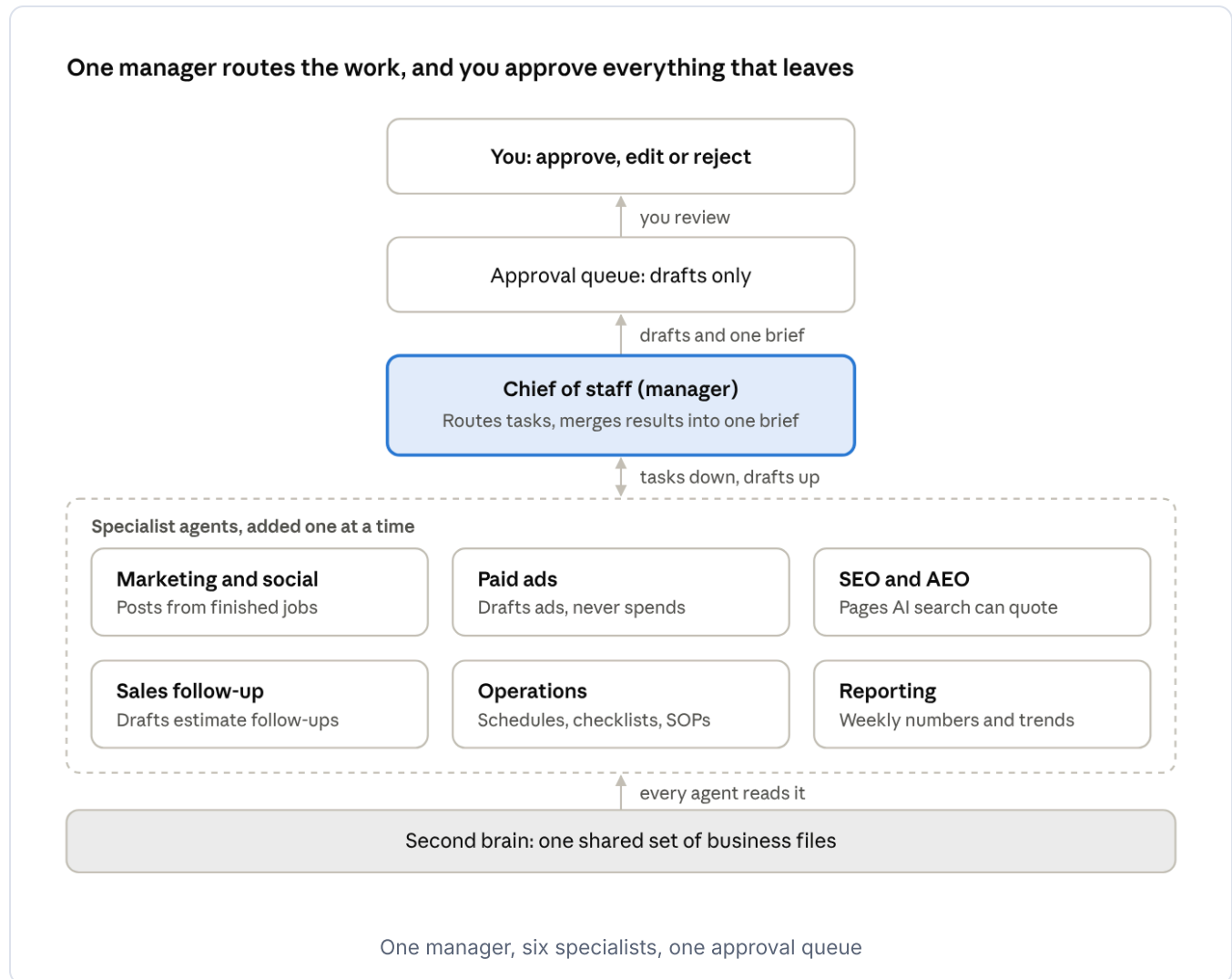
Step 7: Check before you trust it

- ☐ Spot-check ten matched transactions against the original statements.
- ☐ Confirm the forecast's starting cash equals your actual bank balance.
- ☐ Make sure every total in a report ties back to a file.
- ☐ Delete exports from the Project once a month is closed if you do not need them there.

BUILD 5 OF 5

Small AI Workforce

The workforce is a set of specialist agents, each owning one lane, with your chief of staff acting as the manager that assigns tasks and merges results into one brief. This is the build to do last, and the one you will not finish in a weekend. The weekend goal is the manager plus two specialists that work.



Everything flows up through one approval queue. No specialist sends, posts, spends or publishes on its own.

Step 1: Pick your first two specialists

Choose the two lanes that cost you the most time today. For most service businesses that is sales follow-up and marketing. Add the others only after the first two run cleanly for two to four weeks.

Specialist	Job	Reads	Produces
Sales follow-up	Follows up on quiet estimates and new leads	CRM or estimate list, Call-Scripts.md	Draft emails and texts for approval
Marketing and social	Turns finished jobs into posts	Job photos and notes, Brand.md	A week of draft posts
Paid ads	Drafts ad copy and suggests tests	Brand.md, past results	Draft ads; never launches or spends
SEO and AEO	Keeps service pages current and quotable	Services.md, FAQ.md	Draft page updates and FAQ answers
Operations	Keeps checklists and schedules tidy	SOPs, calendar	Updated checklists, schedule flags
Reporting	Summarizes the week's numbers	Finance and marketing exports	A one-page weekly report

AEO, or answer engine optimization, means writing pages so AI search tools can quote them as the answer to a customer's question.

Step 2: Write each specialist as a skill

Each specialist is a skill with a narrow job. Use this template:

```
Name: sales-follow-up
Job: Draft follow-ups for estimates with no reply in 5 or more days.
Inputs: the estimate list, Call-Scripts.md, Business-Overview.md.
Output: one draft per estimate, saved as a Gmail draft, plus a one-line summary for the manager.
Rules: Never send. Never offer discounts or change prices. Stop and flag if a customer complained.
Done when: every eligible estimate has a draft or a reason it was skipped.
```

The "Done when" line matters. It tells the agent when to stop and gives you something to check.

Step 3: Turn the chief of staff into the manager

Add this to the Chief of Staff Project instructions:

```
You also manage these specialist skills: [sales-follow-up], [marketing-posts].
Each morning, run each specialist, collect its drafts and one-line summary,
and add a "Team" section to my morning brief: what each specialist prepared and what needs my approval.
If a specialist fails or has nothing to do, say so in one line. Never approve anything on my behalf.
```

Step 4: Build the approval habit

The morning brief becomes your approval queue. Give each item one of three answers: approve, edit, or reject with a reason. Paste the reasons back into the specialist's skill every Friday so it learns your standards.

Step 5: Add specialists one at a time

Add a third specialist only when the first two meet three tests: you approve most of their drafts with light edits, they run without errors for two weeks, and the brief still takes you less than 30 minutes to review. If review time creeps up, you have added too much, too fast.

A workforce of agents still needs a manager, and **the manager is you.**

Security, Guardrails and Maintenance

Automation without oversight is a faster way to make mistakes. These guardrails apply to every build.

Access

- ☐ Each Project and skill uses only the connectors it needs. The finance assistant needs no inbox access; the video assistant needs no calendar.
- ☐ Connectors use your work account, protected by two-factor authentication.
- ☐ Claude asks before acting through a connector by default. Leave that on.
- ☐ No bank, payroll or tax portal passwords are ever shared with an agent.

Actions

- ☐ Every agent's instructions include "draft only, never send, post, pay, delete or file."
- ☐ Anything that leaves the business (email, post, ad, invoice) is approved by a person.
- ☐ Agents flag payment requests, password resets and urgent wire requests as possible fraud.

Data

- ☐ Client health, legal, financial or personal records stay out of public AI tools unless your plan and policies cover them. Regulated businesses may need a private AI setup that keeps data on infrastructure you control.
- ☐ Write a one-page AI use policy for your team: which tools are approved, what data can go in, who approves outputs.
- ☐ Review what Claude's memory has saved about your business every month and delete anything you would not want stored.

Maintenance rhythm

How often	What to check	Time
Daily	Did the scheduled briefs actually run?	1 minute
Weekly (Friday)	Add new answers to the second brain; paste rejection reasons into skills	15 to 30 minutes
Monthly	Review connector access, memory, and remove stale files	30 minutes
Quarterly	Update Priorities.md; decide whether to add or retire an agent	1 hour

Keep a copy of every agent's instructions in **04 Agent Instructions**. If something breaks or you switch plans, you can rebuild any agent in minutes.

Troubleshooting and Next Steps

Most problems trace back to one of three things: missing context, vague instructions, or a connector that is not actually available to the agent.

Problem	Likely cause	Fix
Drafts do not sound like you	Too few voice examples	Add five more real emails to Best-Emails.md and name the tone in the instructions
Brief misses important emails	No priorities to rank against	Update Priorities.md and list your VIP senders by name
Agent invents a policy or price	Second brain is missing that file	Add the file; instruct the agent to say "not in the second brain yet"
Scheduled brief did not arrive	Run failed or needed an approval	Check the task's run history; run it by hand and approve the connector
Task list is not visible	No task connector connected	Connect your task tool (Asana, Notion and others have connectors) or keep a Tasks.md file in the Project
Video cuts land mid-word	Cuts use rough timestamps	Ask the skill to cut on word boundaries from the transcript
Forecast does not match the bank	Wrong starting balance or a missing account	Re-export all accounts and set starting cash to the actual balance
Too many drafts to review	Too many specialists too fast	Pause the newest specialist until review time drops under 30 minutes

What to do next

1. Run Builds 1 and 2 for two weeks before adding anything.
2. Add Build 4 at the next month-end close, when you are already looking at the numbers.
3. Add Build 3 when you have a backlog of raw video.
4. Grow Build 5 one specialist at a time, using the three tests in Build 5, Step 5.

PICK ONE JOB. BUILD IT THIS WEEKEND.

Want help choosing your **first build?**

Qexa Technology designs and builds AI agents, AI front office systems and private AI for small and mid-sized businesses.

Book a call: alex.qexa.com

About the author. Alex Curtis spent more than two decades with some of the largest wireless technology companies in the world, in mobile device management, cybersecurity and AI automation. Today he builds AI automation and private AI systems for small and mid-sized businesses at Qexa Technology in Nashville, Tennessee.